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Consumer markets abroad

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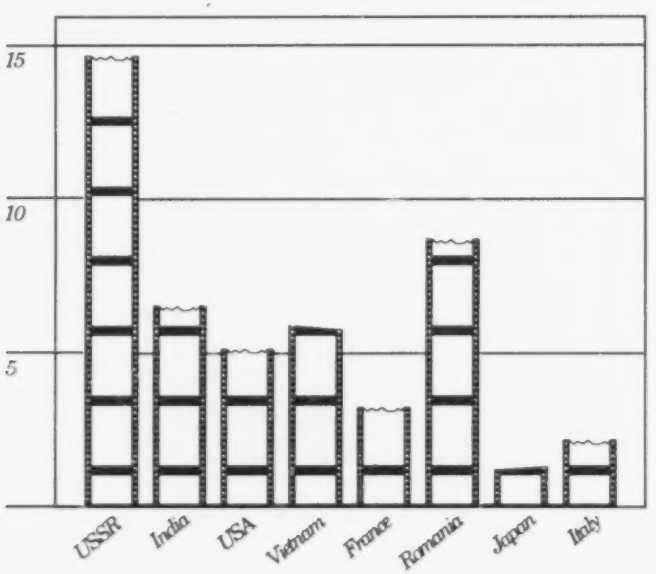
MAD FOR THE MOVIES

The world's most avid moviegoers don't live on Sunset Boulevard. They live in Moscow or Bombay.

FACTS ON FLICKS

For every trip a U.S. moviegoer makes, a Soviet moviegoer makes three.
(Number of movies attended per person per year, by country, 1985)



Note: *Total movie attendances in the above countries are as follows: U.S.S.R. 5.0 billion; India 4.9 billion; U.S. 1.2 billion; Vietnam 344 million; France 172 million; Romania 188 million; Japan 155 million; and Italy 122 million.*
Source: UNESCO Statistical Yearbook 1987.

American cinema is unique for its teen movies and summer flicks. But America doesn't corner the market on stock movies for the masses. India has its Bombay-talkie, Japan has its *yakuza mono* (gangster films), and Hong Kong has its kung fu cache. Moviemaking is big business around the world, and the most avid moviegoers know little of Sunset and Vine.

Filmmakers produce movies in at least 67 countries and show them in more than 125. Around the world, each person goes to the movies three times a year, on average, for an annual world attendance of 12.1 billion viewers. And there is still room for growth: More than 250,000 fixed indoor theaters house over 70 million seats worldwide.

Hollywood's box-office revenues account for about US$4 billion. That's only two-thirds of the world market for film. Worldwide videocassette rentals and sales totaled US$7.2 billion in 1987, a 10 percent

(continued on page 9)

FORMERLY INTERNATIONAL DEMOGRAPHICS
VOLUME 7 NUMBER 10 OCTOBER 1988

NEW ZEALAND'S PACIFIC BLEND

New Zealanders blend Eastern and Western cultures with ease. Their economy, however, is not so integrated.

On two large islands in the South Pacific, more than 3 million New Zealanders blend three distinct cultures. Far from a provincial "Little Britain," New Zealand now fuses Australian, Polynesian, and Asian lifestyles.

While 84 percent of all New Zealanders trace their heritage back to Europe (primarily to Britain), 12 percent are indigenous Maoris, 3 percent are Polynesians who immigrated from Pacific islands, and one percent come from other regions.

One in five New Zealanders living in Auckland, the country's largest metropolitan area, is Polynesian, making it the largest Polynesian city in the world. Whereas Australia's Anglo-Saxon base expanded through European immigration, New Zealand's Polynesian influence grows through Pacific links—to the Cook Islands, Niue Island, the Tokelau Islands, Samoa, and Tonga.

This cultural blending will con-

IN DEPTH

THE "UNDER" COUNT

New Zealanders down under will continue to drift north through the end of the century. (New Zealand's local government regions by census populations, 1981, 1986, and projected 2006, and average annual population growth 1981–86 and 1986–2006)

Local government region	Population			Average annual population growth	
	1981	1986	2006	1981–86	1986–2006[1]
Total, New Zealand	3,175,737	3,307,084	3,760,000	0.8%	0.7%
Total, North Island[2]	2,322,989	2,441,615	2,874,000	1.0	0.9
1. Northland	113,994	126,999	164,000	2.3	1.5
2. Auckland	827,408	887,448	1,075,000	1.5	1.1
3. Thames Valley	54,343	58,665	68,000	1.6	0.8
4. Waikato	221,850	228,303	268,000	0.6	0.9
5. Bay of Plenty	172,480	187,462	231,000	1.7	1.2
6. East Cape	53,295	53,968	60,000	0.3	0.6
7. Tongariro	40,089	40,793	46,000	0.4	0.6
8. Taranaki	103,798	107,600	121,000	0.7	0.6
9. Wanganui	68,702	69,439	76,000	0.2	0.5
10. Hawke's Bay	137,840	140,709	166,000	0.4	0.9
11. Manawatu	113,238	115,500	131,000	0.4	0.7
12. Horowhenua	49,296	53,592	59,000	1.7	0.5
13. Wellington	323,162	328,163	365,000	0.3	0.6
14. Wairarapa	39,689	39,608	42,000	0.0	0.3
Total, South Island[3]	852,748	865,469	886,000	0.3	0.1
15. Nelson Bays	65,934	69,648	75,000	1.1	0.4
16. Marlborough	37,557	38,225	39,000	0.4	0.1
17. West Coast	34,178	34,942	35,000	0.4	0.0
18. Canterbury	336,846	348,712	374,000	0.7	0.4
19. Aorangi	84,772	81,294	78,000	–0.8	–0.2
20. Coastal–North Otago	138,164	137,393	130,000	–0.1	–0.3
21. Clutha–Central Otago	45,402	48,771	53,000	1.5	0.4
22. Southland	107,905	104,618	102,000	–0.6	0.0

[1] ***Note:*** *Department of Statistics's projections for "medium" fertility and net migration.*
[2] ***Note:*** *Includes the population of Great Barrier Island County and extra-county islands.*
[3] ***Note:*** *Includes the population of Chatham Islands County and extra-county islands.*
Source: Demographic Trends, 1987, *New Zealand Department of Statistics, tables G.2 and I.1.*

Consumer markets abroad

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tinue, since intermarriage is common and the number of Polynesians is growing faster than the total New Zealand population. Forty-six percent of the country's population growth between 1981 and 2011 will come from people of Maori descent. By 2011, Maoris will make up 17 percent of all New Zealanders.

ISLAND PARADISE

New Zealand has as much land as Britain. Narrow, mountainous islands stretch a distance equivalent to North America's western coastline from Los Angeles to Vancouver. But New Zealand's land supports only 6 percent as many people as Britain's does (3.3 million compared with 56 million).

One-quarter of all New Zealanders live in Auckland, the country's largest metropolitan area, and fully three-quarters live on North Island, the smaller of the country's two major islands. As in Norway, geography places severe

THE NORTHERN FRONTIER

Of New Zealand's local government regions, Northland and Auckland will grow fastest between 1986 and 2006. (New Zealand local government regions by projected average annual rate of population growth, in percent, 1986–2006)

Map source: *New Zealand Demographic Society.*

SPREAD THIN

Three out of four New Zealanders live on North Island. (Population of New Zealand local government regions as a percent of total population, 1986)

Local government region	*Percent of total*
Total, New Zealand	100.0%
Total, North Island	**73.8**
Northland	3.8
Auckland	26.8
Thames Valley	1.8
Waikato	6.9
Bay of Plenty	5.7
East Cape	1.6
Tongariro	1.2
Taranaki	3.3
Wanganui	2.1
Hawke's Bay	4.3
Manawatu	3.5
Horowhenua	1.6
Wellington	9.9
Wairarapa	1.2
Total, South Island	**26.2**
Nelson Bays	2.1
Marlborough	1.2
West Coast	1.1
Canterbury	10.5
Aorangi	2.5
Coastal–North Otago	4.2
Clutha–Central Otago	1.5
Southland	3.2

Source: Demographic Trends, 1987, *New Zealand Department of Statistics, table E-2.*

constraints on all aspects of service, communication, and distribution.

SLOWING DOWN

Like many European countries, New Zealand's primary population concern has gone from one of growth to one of composition. The total population grew about 1.7 percent a year between 1951 and 1981. But growth is projected to slow to 0.5 percent between 1981 and 2011.

Fast growth meant a greater all-around demand for goods and services through the late 1970s. In shaping consumer demand today, the size of one segment of the population relative to another is more important than the total population size.

Age will play a major role in New Zealand's changing demands for goods and services. An older labor force will affect recruitment and promotion, while pensions and insurance will also become more important industries.

Regionally, population growth follows a "drift north" pattern, much like the American "drift west." New Zealand retirees will continue to move to warm coastal areas of the country, and many people will move from one city to another. Marketers will find increasingly distinct regional preferences throughout the country.

Migration should contribute to a greater population imbalance between New Zealand's north and south islands. As future growth concentrates in the north—already the home of three out of four New Zealanders—the country's uneven population distribution will intensify. Growth will be strongest in Auckland, around Wellington and its commuter zones, in coastal areas,

CROWD CONTROL

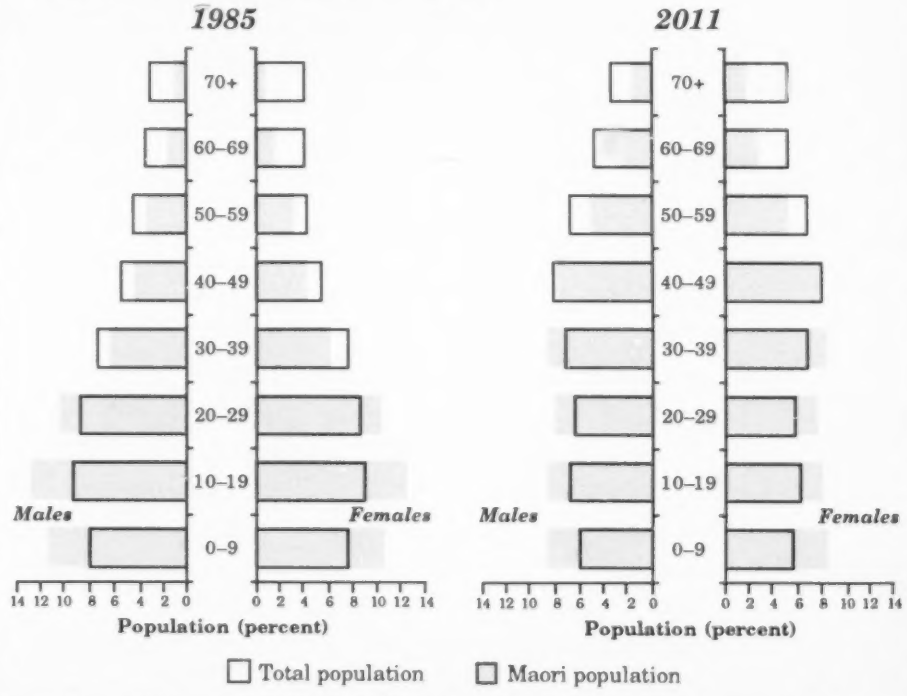
Even New Zealand's largest cities are spacious by urban standards. (New Zealand local government regions by density, in persons per square kilometer, 1986)

Local government region	*Density (persons per km²)*
Total, New Zealand	**12.4**
Total, North Island	**21.3**
Northland	10.1
Auckland	170.6
Thames Valley	12.6
Waikato	17.2
Bay of Plenty	20.5
East Cape	4.7
Tongariro	3.4
Taranaki	13.7
Wanganui	7.6
Hawke's Bay	11.4
Manawatu	17.3
Horowhenua	33.2
Wellington	234.0
Wairarapa	5.7
Total, South Island	**5.7**
Nelson Bays	6.8
Marlborough	3.0
West Coast	1.5
Canterbury	18.9
Aorangi	4.1
Coastal–North Otago	13.0
Clutha–Central Otago	1.7
Southland	3.8

Source: Demographic Trends, 1987, *New Zealand Department of Statistics, table E-2.*

HEAD COUNT

Proportionally, Maoris are much younger than all New Zealanders today, but they will dominate middle-age groups by 2011. (Populations of total New Zealand and Maori populations, by age group, in percent, 1985 and projected 2011)



Source: Demographic Trends, 1987, *New Zealand Department of Statistics; New Zealand Demographic Society.*

and all of the regions where tourists or retirees gather.

BABY BOOMERS DOWN UNDER

America's postwar baby boom was mild compared to New Zealand's. Its boom marked a return to pioneer marriage patterns, where women married young and bore about six children each. New Zealand's baby boom lasted longer than that of the United States, but came to a dramatic halt in the 1970s with the widespread introduction of contraceptives there.

Births come fewer and later in the 1980s, although there are some exceptions. Many couples are just barely replacing themselves, but women aged 27 to 34 are bearing more children than women in that age group have before, as are women aged 35 to 39.

IMMIGRATION

Foreign-born New Zealanders are a smaller and smaller share of the total population. The share of immigrants to the total population fell from an all-time high of 50 percent in 1881 to 20 percent after World War II, and to 15 percent in 1986.

Politics plays a large role in the immigration record of the 1970s and 1980s. Given the country's below-replacement fertility, net migration will become more important to New Zealand's growth in the coming years.

MAORI TROUBLES

While New Zealand's many cultures integrate well, their socioeconomic gains are not as even. The Maori minority has followed a Third World growth pattern, with large families and high mortality rates. Some of the changes characteristic of industrializing populations are just beginning for the Maoris, whereas they have already taken place for most other New Zealand ethnic groups.

Maori families shrank rapidly in the late 1970s, a little bit later than for other New Zealand families. This change means that the Maori age structure will increasingly diverge

CATCHING UP

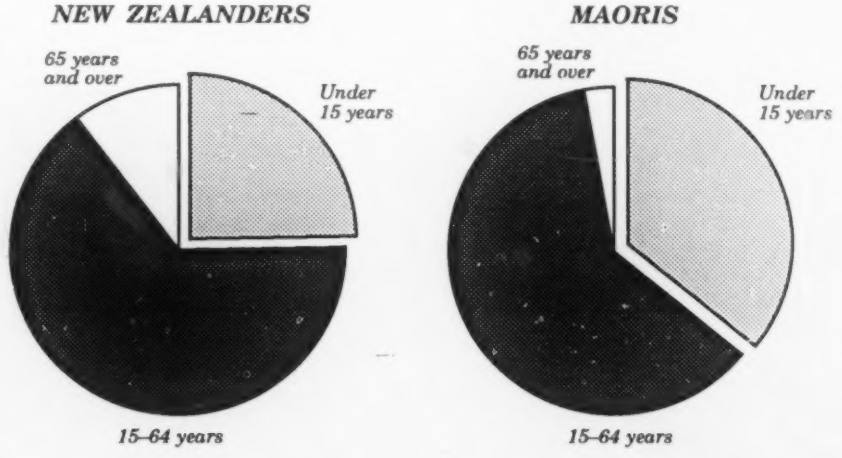
The life expectancy gap between New Zealand men and women is smaller than it is between American or French men and women. (Expectation of life at birth, by sex, New Zealand and selected countries, 1985)*

Country	*Men*	*Women*
Australia	72.6	79.1
United Kingdom	71.1	77.1
France	70.4	78.5
New Zealand	**71.0**	**76.8**
Singapore	68.7	74.0
Sweden	73.6	79.6
U.S.	70.1	77.6

**Note: Data for Australia are for 1984; for England and Wales, 1980–82; for France, 1983; for New Zealand, 1985; for Singapore, 1980; for Sweden, 1983; and for the U.S., 1984.*
Source: Demographic Trends, 1987, *Department of Statistics, New Zealand, table C.5.*

GENERATION GAP

On the whole, Maoris are younger than most New Zealanders: More than one-third are under age 15. (New Zealand and Maori population by age group, in percent, 1985)



Source: Demographic Trends, 1987, *New Zealand Department of Statistics, table A.7.*

from the age structure of other ethnic groups.

BRITISH ETIQUETTE

New Zealand derived its social structure primarily from the United Kingdom. One out of every two New Zealanders belongs to a main-line Protestant church: 24 percent of these Protestants are Anglican, and 18 percent are Presbyterian. Only about 15 percent of New Zealanders are Catholic.

Recently, small charismatic and Pentecostal groups have gained ground, although one in four New Zealanders reported "no religion" in 1986. Church attendance rates are lower than in the United States.

New Zealand was one of the first places in the world where women could vote. The Ministry of Women's Affairs was established in 1985. Even so, women are still underrepresented in a number of key economic sectors, and New Zealand women, particularly Maori women, are overrepresented among the poor and the unemployed.

HEALTH AND EDUCATION

New Zealanders live a long life, on average. Men live 71 years; women live 77 years. Non-Maori women have the highest life expectancy of any group.

The employment structure reflects an educated population. New Zealand was one of the first countries to introduce free compulsory schooling (in 1877), and all children from 6 to 15 years old still receive a secular education.

While basic education is guaranteed, participation rates in higher education still lag behind those of many European countries. Only 8.4 percent of all 18-to-24-year-olds in New Zealand went to a university in 1986. That was only half the partici-

AUSTRALIAN PULL

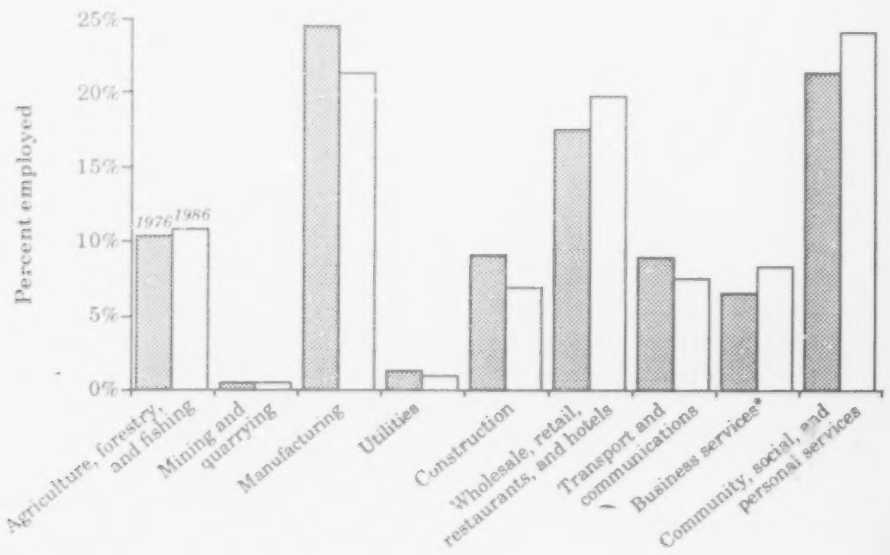
Most New Zealand emigrants go to Australia. They shape New Zealand's total migration pattern. (Migration by country of last permanent residence or country of next residence, New Zealand, 1978–1986)

	Net migration	
Year	To/From Australia	Total
1978	–22,076	–26,708
1980	–29,618	–34,437
1982	–20,814	–11,482
1984	1,674	6,558
1986	–22,578	–21,513

Note: *A negative number denotes an excess of departures over arrivals.*
Source: Demographic Trends, 1987, *New Zealand Department of Statistics, table D.6.*

AFTER THE ASSEMBLY LINE

Service, farming, and retail trade keep New Zealanders employed. Manufacturing and construction have fallen on hard times. (Employment by sector in New Zealand, in percent, 1976 and 1986)



* ***Note:*** *Includes finance, insurance, and real estate.*
Source: New Zealand Census, *New Zealand Department of Statistics.*

pation rate in Ontario, Canada, where the university system is closely comparable to New Zealand's.

WOOLLY WORKS

Family-owned and operated farms are the mainstay of New Zealand's economy. Three-fifths of the country's exports begin on farms. New Zealand's demographic transition, urban growth, and industrial patterns parallel those of Canada, Australia, and the United States. But its dependence on pastoral exports parallels Uruguay's.

Twelve percent of all workers spend their day in primary industrial occupations. Workers in secondary industry accounted for 28 percent of all workers in 1986—down from 38 percent in 1966. Service workers are on the increase: About 60 percent of all New Zealanders perform some kind of service, up from 41 percent in 1936.

In addition to their close cultural relationship, New Zealand and Australia are intimately connected in an open market. These two countries form a 20-million-person consumer market—the southwestern arc of the Pacific Rim.

This summer, New Zealand and Australia signed an extended free-trade agreement that will eliminate all tariffs and export controls between the two countries by July 1, 1990. The mid-August accord speeds a process that began in 1983 with the Closer Economic Relations Agreement (CER).

REFORM CULTURE

New Zealanders are reformers—a holdover from their frontier past. Their penchant for equality has helped to create a more even spread of wealth than in most capitalist countries. One indication of this trend is the fact that fully 70 percent of New Zealanders own their own homes.

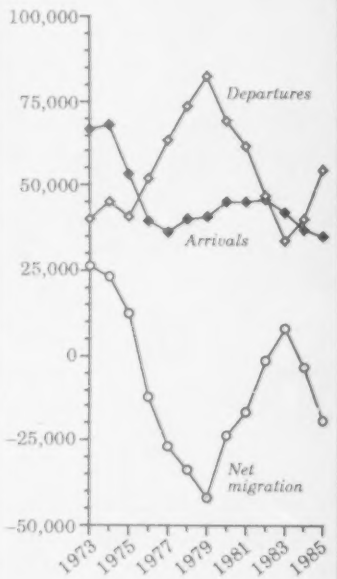
More than two-thirds of all families live in detached houses with an average occupancy of one person per bedroom. In addition, most households have a refrigerator, a washing machine, and a color television.

Given that relative level of prosperity, New Zealanders' ownership of sophisticated consumer durables is relatively low. One-quarter of all homes had a microwave oven in 1986, fewer than one-third had a videocassette recorder, only 17 percent had an automatic dishwasher, and 9 percent had a home computer.

But New Zealand spending habits are changing. In general, most households are moving away from

MIGRATION DOWN UNDER

While arrivals to New Zealand remain fairly constant, departures fluctuate dramatically. (Arrivals, departures, and net migration, New Zealand, 1973–1985)



Source: Demographic Trends, 1987, *New Zealand Department of Statistics.*

GOING TO THE CHAPEL, AGAIN

First-time brides and grooms are older than they used to be. So are second-time brides and grooms. (Average age at marriage of brides and grooms by previous marital status, New Zealand, 1970–1985)

	Average age of bridegroom (years)				*Average age of bride (years)*			
Year	*Never married*	*Divorced*	*Widowers*	*Total*	*Never married*	*Divorced*	*Widows*	*Total*
1970*	23.9	40.4	56.9	26.4	21.3	36.1	50.1	23.5
1975*	24.2	38.8	56.7	27.1	21.6	35.1	50.5	24.2
1980	25.2	39.2	57.9	28.7	22.7	35.8	51.9	25.8
1985	26.4	40.2	59.7	30.4	24.0	36.4	52.3	27.5

* *Note: Prior to 1980, average age at marriage was calculated from complete years. From 1980 onwards average age at marriage was calculated from exact age.*
Source: Demographic Trends, 1987, *New Zealand Department of Statistics.*

basic needs and toward services. Travel, for instance, is almost a national obsession. In 1987, about 16 percent of the entire population traveled overseas.

SOURCES

New Zealand has a well-developed official statistical series. A census is taken every five years (the last one was taken in 1986). The official series also includes vital registration and migration data, and intercensal special surveys. Some of the more useful surveys cover the labor force, household income and expenditures, and employment.

Official data are most easily accessible in the *Yearbook* and in the *Monthly Abstracts of Statistics*. To contact the statistical offices, write to the Department of Statistics, Private Bag, Wellington, New Zealand.

A number of private-sector firms conduct consumer, media, and marketing surveys on national and regional samples. Demographic analyses specifically linked to business issues can be found in *Population Change, Business Implications and Planning*, published by the New Zealand Demographic Society, P.O. Box 225, Wellington. In addition, AGB-McNair published *Business and Market Implications of Population Change*. Write to Market Research and Information Systems, P.O. Box 11384, Wellington.

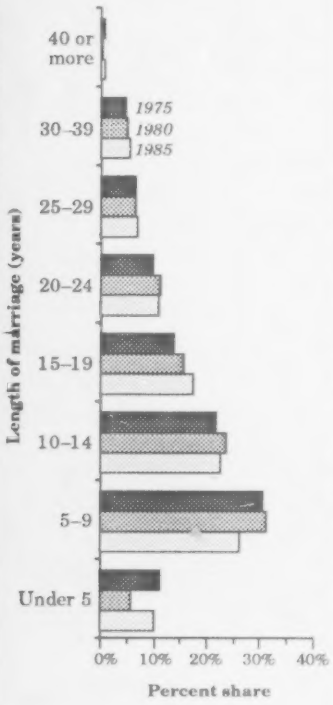
The New Zealand Planning Council frequently publishes reports by its Population Monitoring Group. The 1988 report will cover regional population trends. Contact the New Zealand Planning Council, P.O. Box 5066, Wellington.

The Population of New Zealand: Country Monograph No. 12, the most detailed study on population trends in New Zealand and their effects on the economy, society, and the environment, comes from the United Nations Economic and Social Commission for Asia and the Pacific (ESCAP). This two-volume monograph, part of a series on Asia and the Pacific, is available from the Population Division, ESCAP, United Nations, Rajadamnern Avenue, Bangkok, Thailand.

—Ian Pool, Director
Population Studies Centre
University of Waikato
—Janet Sceats, Medical Demographer
Waikato Hospital Board
Hamilton, New Zealand

BREAKING UP IS HARDER TO DO

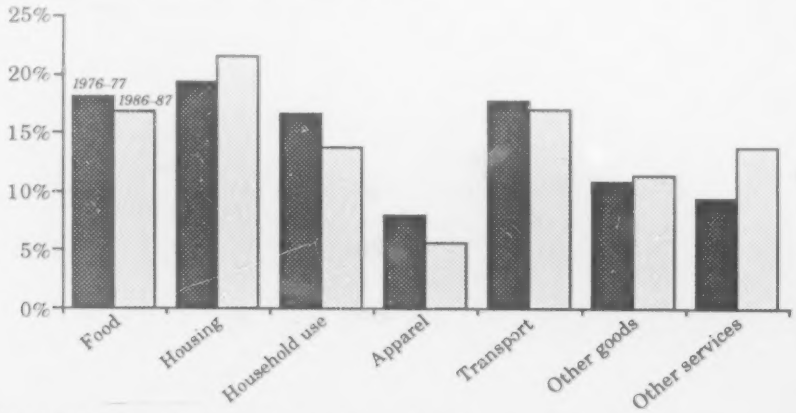
In 1975, New Zealand couples split up fast. Most marriages ended in less then ten years. By 1985, divorce struck old and new couples more evenly. (Percent of all divorces by duration of marriage, in years, New Zealand, 1975, 1980, and 1985)



Source: Demographic Trends, 1987, *New Zealand Department of Statistics, table F.9.*

HOUSEHOLD STASH

Housing and services take up a larger share of New Zealand budgets then they did a decade ago. (Average weekly household expenditures, in percent, New Zealand, 1976–77 and 1986–87)



Source: Household Income and Expenditure Surveys, *New Zealand Department of Statistics.*

(Mad for the Movies, continued from page 1)

increase over the 1986 total.

While American and European movie attendance peaked in the 1960s, and Japanese attendance peaked around 1970, Asian and African attendance continues to grow. Movie attendance has grown by more than 700 million viewers in less-industrialized countries, while it has declined by over 3 billion viewers in industrialized countries.

VIEWER DEMOS

The Soviet Union is the most avid moviegoing nation in the world. One in three moviegoers is Soviet, and each one of them sees 15 movies a year, on average. India runs a close second, and the United States runs a distant third.

But in terms of per capita attendance, none of the big three countries comes close to the Caribbean island nations. Residents of the Turks and Caicos Islands watch 80 movies a year, on average, according to the United Nations Educational, Scientific and Cultural Organization (UNESCO). Singapore and Hong Kong residents go to more than 10 movies per year, as do people from Iceland, Grenada, and the Falkland Islands.

The typical moviegoer is young. In the U.S., 12-to-24-year-olds accounted for more than half of all movie admissions in 1985. The number of 14-to-24-year-old viewers grew from 27 million in 1960 to 44 million in 1984.

As baby boomers age, cinemas will lose their first-date appeal. Movie attendance by those aged 40 and older rose 56 percent from 1986 to 1987, according to the Motion Picture Association of America.

The maturing of the motion-picture industry isn't universal. Eighty percent of Japanese filmgoers are still between the ages of 15 and 25, and the most avid British film fans are between 16 and 24.

British teens watch movies in pairs. One-third of all 16-to-24-year-olds who have a steady relationship report that they go to the movies at least once a month, while only 15 percent of British "singles" see movies that often.

MAKERS AND TAKERS

More than half the world's fixed cinemas (as opposed to mobile movie houses and drive-ins) are in the U.S.S.R. It has a total of 177,000 theaters, while the U.S. has only 16,000, and India has 13,000. Soviet theaters sometimes use cinemas to disseminate government information.

India is the most prolific movie-producing nation in the world. Indian producers released 806 films in 1986, down from a peak of 912 in 1985. Japanese writers, producers, and directors make more than 300 feature films a year, compared with the U.S. total of 264 in 1985, according to UNESCO. Other leading Asian movie producers are the Philippines, Hong Kong, Thailand, Taiwan, and the People's Republic of China.

But the foreign market for American films has been the greatest. In 1983, foreign movie houses rented US$2.1 billion worth of American films. In terms of revenue, American films play best in Germany, France, Japan, and the United Kingdom.

With videocassette rentals rising, the importance of foreign markets to the U.S. movie industry is declining. While foreign markets provided almost one-third of U.S. film revenues in 1978, they only accounted for 16 percent by 1984. Meanwhile, home video revenues went from zero percent of market share in the U.S. in 1978 to 12 percent in 1984, and pay TV went from 2 percent of market share to 19 percent in 1984.

—Stephen Karel
East-West Center
Honolulu, Hawaii

BIG SCREEN'S TOP TEN

Hollywood directors face stiff competition in Asia. India makes more movies than any other nation, and also has the world's largest seating capacity. (Number of long (feature) films produced by country, 1985; cinema seating capacity of selected countries, 1986)

Rank	*Country*	*Number of long films produced**
1.	India	912
2.	Japan	319
3.	U.S.	264
4.	France	196
5.	U.S.S.R.	163
6.	Philippines	143
7.	Hong Kong	141
8.	Thailand	134
9.	Turkey	96
10.	Pakistan	92

Rank	*Country*	*Number of seats (thousands)*
1.	India	6,030
2.	U.S.	5,611
3.	U.S.S.R.	5,553
4.	Spain	3,100
5.	Indonesia	959
6.	Japan	950
7.	Czechoslovakia	895
8.	West Germany	723
9.	Bulgaria	717
10.	Brazil	708

** Note: The minimum length of films classified as "long" varies considerably from country to country. Most countries have adopted standards close to 2,000 meters.*
Source: UNESCO Statistical Yearbook 1987.

DISCOVER: GLASGOW, SCOTLAND

The Scottish glory that once was nautical is now high-tech.

Before she ever plied the Mississippi from her home in New Orleans, the *Delta Queen* slid down Scotland's River Clyde, cruising by the city of Glasgow, where the best ships were built.

World-renowned "Clyde-built" ships have gone the way of coal, steel, and textiles in Scotland. Glasgow industries that led Britain's industrial revolution now have slipped into what most consider irreversible decline.

But Glasgow is no longer suffering. Today, this city of about 725,000 residents—or about 15 percent of Scotland's total population—has cloned California's high-tech Silicon Valley. Scotland now produces more computer products per capita than any other country, and Scottish computer exports even exceed exports of Scotch whiskey in value.

"Silicon Glen"—a corridor brimming with computer and related industries—now employs 10,000 more workers than the old shipbuilding, coal, and steel manufacturers combined. The high-tech beltway that surrounds Glasgow extends north 70 miles to Edinburgh, Scotland's capital.

Politics plays a major role in this growth. The city's "Glasgow Action" program promotes native and foreign investment, as does the Glasgow-based Scottish Development Agency (SDA) and its seven-year-old "Locate in Scotland" program, which drew 88 new projects worth nearly US$500 million and about 11,900 jobs by July 1988.

SDA's incentives attracted US$3.5 billion over the past four years, mainly from the U.S., where the agency has offices in Stamford, Connecticut, Chicago, Houston, and San Francisco.

SCOTTISH EXODUS

But intense commercialization is rearranging downtown demographics, as businesses push Glasgow residents out of the city center. At the present rate of exodus, Glasgow's population is projected to drop below 700,000 by 1991—for the first time in 100 years.

From 1971 to 1981 Glasgow's city center lost 22.8 percent of its population. The number of households fell by more than 13 percent, although elderly households (aged 65 and over) increased by 54 percent.

Glasgow's age structure matches that of other European cities. The 15-to-29-year-old group makes up about 27 percent of the city's population. That group's share is ex-

GLASGOW GEOGRAPHY

Glasgow's population is almost evenly divided among housing districts.
(Population distribution by housing district, number and percent, Glasgow, 1987)

Housing district	*Number*	*Percent*
Total Glasgow	725,000	100.0%
South West	110,200	15.2
South	108,025	14.9
East	104,400	14.4
South East	92,800	12.8
West	84,100	11.6
North West	79,750	11.0
North	74,675	10.3
Easterhouse	47,850	6.6
Drumchapel	23,200	3.2

Source: Glasgow: A Statistical Profile of Economic and Social Change, *Scottish Development Agency, 1987.*

pected to decline sharply over the next few years, while Glasgow's share of 30-year-olds should grow significantly. Glasgow's share of "oldest old," aged 80 and over, will increase slightly as well.

QUALITY OF LIFE

More than half of Glasgow's housing —58 percent—is public, and 70 percent of it is rated in "poor" condition. That compares with England's 28 percent of public housing that is in poor condition. Fewer than 30 percent of Glasgow residents own their homes, compared with more than 60 percent of all British residents.

The city already is beginning to rival Edinburgh in insurance and financial services. By some estimates, Glasgow's financial importance is second in the U.K. only to "the City," London's banking district.

A highly qualified labor force is one reason companies relocate to Glasgow. "Our Scottish workers have proven to be among the best anywhere in the world—including Japan," says Shinji Yatsuzka, director of Mitsubishi Electric.

Fully 400,000 people work in the city; three-quarters of those are in services or administration. That makes Glasgow Scotland's largest employment and consumer market.

Electronics firms in Glasgow now employ 42,000 people. Of that total, 15,000 workers are new to the industry since 1985. U.S. firms hailing from Amherst to Anaheim employ one in every ten Scottish workers.

But the picture isn't all that rosy for Silicon Glen. Computer companies can't absorb the labor surplus fast enough: Glasgow's unemployment rate, currently running at about 21 percent, is among the highest in the U.K.

HIGH-TECH TO HIGH-RISE

Glasgow is building to meet the needs of Silicon Glen industries. Developers use low rents to attract corporate headquarters. The cost of office space in Glasgow can be half that in London—or less. But Glasgow's growth has its detractors. Some call the city a "Tartan Dallas."

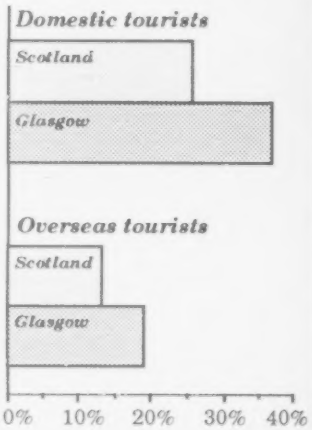
Despite U.K. prime minister Margaret Thatcher's lukewarm outlook on the 1992 single European market, Glasgow is gearing up for the event. Manufacturers' primary goal is to become Europe's supplier of high-technology products.

—Peter Inserra
Paris, France

For more information on Glasgow, contact Howard Moody, the North American director of SDA, at 1-800-THE-SCOT, or (203) 325-8525. SDA's East Coast address is 1 Landmark Square, Suite 810, Stamford, CT 06901.

CONVENTION CENTER

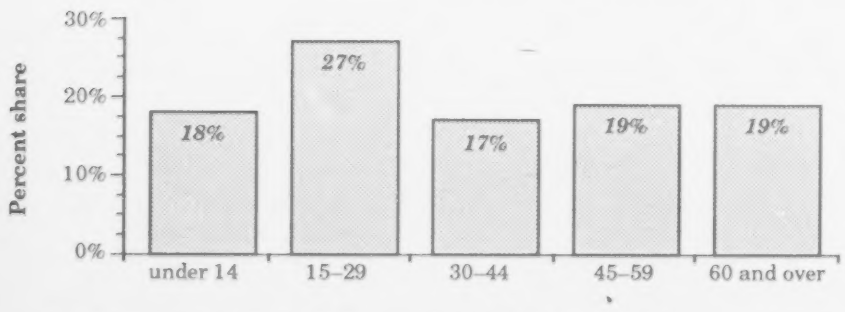
Most of Glasgow's visitors come for business. (Destination of business visitors to Scotland, in percent, 1987)



Note: Glasgow: A Statistical Profile of Economic and Social Change, *Scottish Development Agency, 1987.*

AGE GAUGE

Nearly one-third of Glasgow residents are aged 15 to 29. (Glasgow residents by age, in percent, 1987)



Source: Glasgow: A Statistical Profile of Economic and Social Change, *Scottish Development Agency, 1987.*

THE WORLD OF NEWS

Newspaper readers face the same temptation in every country: television.

PRODUCT COMPARISON

The United States may pride itself on having a free, aggressive press. But many countries rank higher in newspaper readership.

Japan is home to the world's most voracious newspaper readers, followed by East Germany, Liechtenstein, and Finland. Eighteen countries boast a larger share of newspaper readers than the United States, according to the United Nations Educational, Scientific, and Cultural Organization (UNESCO).

Circulation and literacy go hand in hand. A homogeneous population and a good educational system also contribute to the size of a nation's newspaper readership, according to Stanford professor Marion Lewenstein. Interest in international affairs, a heavily-used public-transit system, and a comfortable per capita income also help to boost circulation.

As of 1984 there were 125 daily papers in Japan, with a combined circulation of 57.4 million. Thus there were 562 copies circulated for every 1,000 Japanese—well above the Soviet Union's 422, the United States' 269, and France's 212.

A Japanese newspaper subscription buys a morning and an evening edition. Morning papers are more popular, largely because of an efficient 5 a.m. to 7 a.m. distribution network. Local papers fight for circulation with big national papers, such as *Yomiuri Shimbum,* which prints more than 14 million papers a day, and *Asahi Shimbum,* which has 7.5 million circulation. Japan is also home to the world's most highly read business paper, *Nihon Keizai Shimbum (Japan Economic Journal),* which prints twice daily, seven days a week: 2.7 million papers in the morning, 1.5 million in the evening.

Geography and state politics are two major reasons why the United States has not developed a sizable national press. The two biggest national papers are the *Wall Street Journal,* with 2 million readers, and the general-interest *USA Today,* with 1.3 million readers. Local papers account for most of the nation's 62.9 million circulation. Overall, there are 1,645 daily U.S. newspapers and 7,498 weeklies. Adult readership is highest among people aged 55 to 64; it is lowest among 18-to-24-year-olds. America's relatively high illiteracy rate—an estimated 13 percent of American adults are illiterate—contributes to a proportional decline in readership.

Not only is U.S. newspaper circulation dwindling, but readership habits are changing as well. Afternoon papers are disappearing almost as fast as the blue-collar

READ ALL ABOUT IT . . .

Total newspaper circulation is highest in the U.S.S.R., but proportionally, Japanese read the most.
(Estimated newspaper circulation and circulation per thousand people, by country, 1970 and 1985)*

	Circulation		*Per thousand*	
Country	*1985*	*1970*	*1985*	*1970*
Japan	68,296,000	53,023,000	569	512
U.S.S.R.	109,306,000	81,633,000	405	336
U.S.	62,920,000	62,108,000	269	303
Canada	5,667,000	5,534,000	219	230
France	10,332,000	12,067,000	191	238

* ***Note:*** *Figures for Canada are for 1978, not 1970; figures for France and the U.S.S.R. are for 1982, not 1985.*
Sources: Statistical Handbook of Japan 1987, *Statistics Bureau, Management and Coordination Agency, Tokyo;* Canada Yearbook 1988, *Statistics Canada;* Statistics Yearbook 1984, *UNESCO.*

workers who get home early enough to read them. There are more two-income families and there is less time to read papers. In general, U.S. newspaper readership is not keeping pace with the growth in population and households.

France also ranks poorly in newspaper readership. Twenty-three countries have proportionally more readers than France, with its 101 dailies and 12 million circulation.

French newspaper chains have snapped up local papers in recent years, sometimes reducing local coverage to inserts. The country's largest daily, the Rennes-based *Ouest-France,* puts out dozens of different local editions.

The Soviet Union ranks seventh in newspaper readership, according to UNESCO, with 724 dailies and a total circulation of 116 million. Soviet circulation numbers may be suspect because they measure distribution—not actual readership—of state-run papers. Even so, *glasnost* has caused a boom in readership.

The weekly tabloid *Moscow News* languished at 50,000 readers five years ago; with a new editor and livelier content, it now has more than 1 million readers. The two major national dailies, *Pravda* and *Izvestia,* are offering more-daring coverage and including letters to the editor. *Pravda,* the only Soviet paper to print 365 days a year, has a circulation of about 18 million. In addition to the national dailies, there are Soviet papers that cover republics, territories, districts, cities, and even farm collectives.

According to United Nations data, Soviet newspaper circulation has been steadily climbing, from 336 papers per 1,000 people in 1970 to 422 in 1984. If these numbers are accurate, the Soviet Union is bucking a global trend of declining newspaper readership. Even Japan's 562 papers per 1,000 people in 1984 is down from 575 in 1982. France's 212 is down from 238 in 1970, and the U.S.'s 269 is down from 303 in 1970.

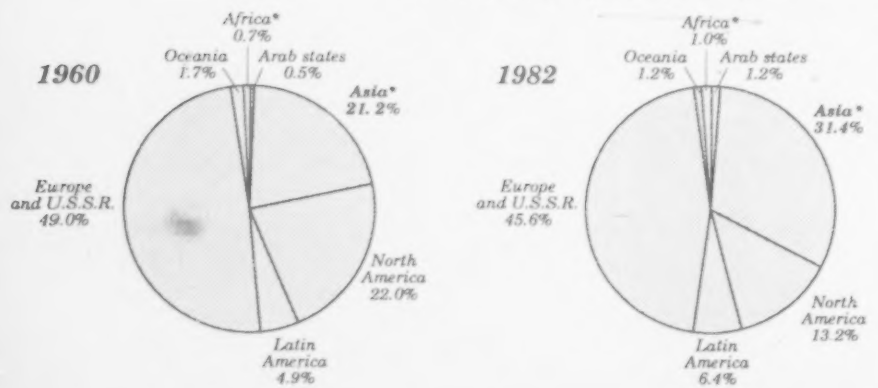
Why the worldwide drop? Factors vary by nation, notes Lewenstein: In England, an increasing number of ethnic minorities don't identify with news coverage; in the United States, citizens have become detached from their national and local governments. But one factor is universally affecting newspaper circulation: broadcast media. After all, television makes no demands on literacy.

—Ruth Hamel
San Francisco, CA

Japan is home to the world's most voracious newspaper readers, followed by East Germany, Liechtenstein, and Finland.

REGIONAL READERSHIP

A growing share of newspaper readers are Asian. (Distribution of circulation of daily general-interest newspapers, by region, in percent, 1960 and 1982)



** Note: Excluding Arab states.*
Source: UNESCO Statistical Yearbook 1984, *VI-4, figure 14.*

REGIONS: CONSUMER TRENDS AROUND THE WORLD

EUROPE

Londoners prosper: 48 percent of London householders said they were financially better off than they were a year before. Only 41 percent of all British say they are financially better off, according to a 1986 study released last August on U.K. lifestyles.

The study, conducted by independent research company Mintel, surveyed nearly 1,000 British households as to their buying habits and attitudes. Forty percent of those responding in Britain's southeast (which includes London) felt bothered by overcrowding, a housing shortage, traffic congestion, and rail commuting. These British reported disappointment with the southeast's high crime rate, stress, and cost of living.

Southeastern residents "are involved in the affluence trap," says Frank Fletcher, research director of Mintel. "They are materialistic and competitive in a way that northerners are not."

The study shows that the prosperity divide between Britain's north and south is widening. Half of all British in the north said that they were financially worse off than the year before. Even so, overall car ownership in the U.K. is up, as is color TV ownership (85 percent of all households), video ownership (25 percent), and microwave ownership (35 percent). For more information, write to Mintel, KAE House, 7 Arundel Street, London WC2, England.

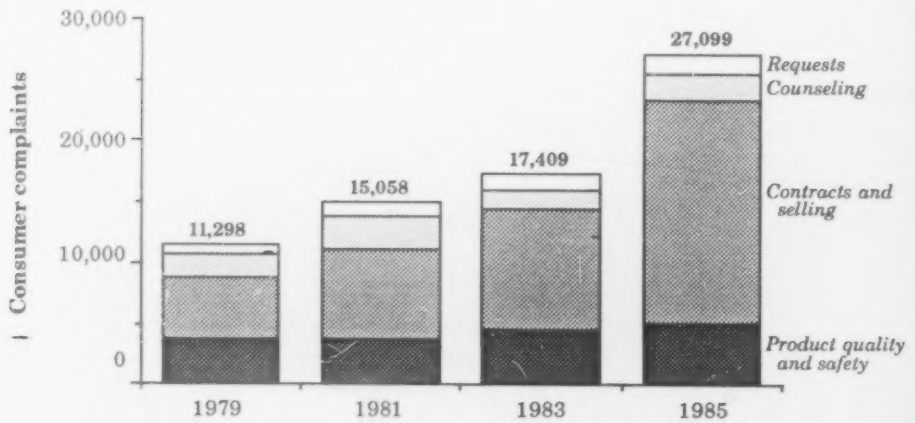
NORTH AMERICA

Canadian seniors give generously—to each other, according to Statistics Canada's new study, *Family and Friendship Ties among Canada's Seniors*. Those aged 55

C I T Y S T A T S

TOKYO WOES

Are Tokyo's days of impeccable quality and service over? The Consumers' Center in Tokyo reported over twice as many complaints in 1985 as in 1981.
(Number of "counseling cases" at the Consumers' Center in Tokyo, 1979–1985)



Source: 2nd Long-Term Plan for the Tokyo Metropolis, *Tokyo Metropolitan Government Municipal Library Series, International Communication Division, Tokyo, 1987, p. 176.*

and over are actively involved in taking care of other seniors, rather than relying on younger family members.

Money is their first aid. More than half of Canadian seniors give money to other seniors. Baby-sitting, transportation, and volunteer work also are popular forms of assistance, with 23 percent, 22 percent, and 16 percent of seniors performing those functions, respectively. Only 12 percent of Canadians aged 55 and over offer housework help to their fellow seniors, and only 5 percent offer assistance with personal care.

Participation rates differ by age group. Canada's youngest seniors—those aged 55 to 64—provide most of the transportation for others; few 80-to-98-year-olds are able to meet that need.

Age is also a factor in baby-sitting, but not when it comes to donating money. There, education shapes giving patterns. More than three-quarters of Canadian seniors with a postsecondary degree gave money to other seniors, while only half of those with some secondary education did.

For more information about Canadian senior care, write to Statistics Canada, Communications, Tunneys Pasture, 3-0, R.H. Coats Building, Ottawa, Ontario, K1A 0T6.

By 2000, Tokyo's daytime population will reach 14.8 million people. Fifteen percent of them will be aged 65 or over, and collectively they will create 5.32 million tons of garbage. These and other little-known facts are part of the Tokyo Municipal Government's *2nd Long-Term Plan for the Tokyo Metropolis.*

Of a projected 5 million Tokyo households, 3.6 million will be part of Tokyo's central wards; 1.4 million will be part of outlying cities and towns. Each household will have 2.5 people on average, compared to 2.9 in 1970.

In preparing for such a heavily populated city, planners have published detailed projections concerning the Tokyo metropolitan area over the next 15 years. Per capita income, they estimate, will grow 6 percent a year between 1991 and 1995, and then by 5.6 percent a year between 1996 and 2000. Meanwhile, consumer prices will increase by 3.2 percent and 2.9 percent a year, respectively.

For more information on Tokyo's population, environment, or economy, write the Tokyo Metropolitan Government, International Communications Division, Bureau of Citizens and Cultural Affairs, 5-1 Marunouchi 3-chome, Chiyoda-ku, Tokyo, Japan.

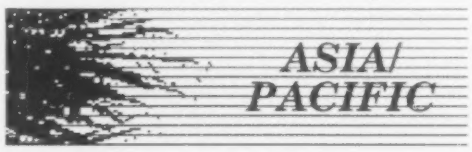
INTERNATIONAL DEMO MEMO

Pairs of throwaway chopsticks Japanese use per year:

12 billion

(that's enough wood to build about 12,000 Japanese homes)

Source: Third World Compass News Features, *Luxembourg.*



Japan's New Consumers

You can find out more about Japanese lifestyles, attitudes, demographic characteristics, spending patterns, and buying behavior in ***Japan's New Consumers,*** *a two-part special report written by experts from the Center for International Research of the U.S. Census Bureau and the editors of* Consumer Markets Abroad.

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Women and Recession, edited by Jill Rubery, Routledge, Chapman and Hall, 29 West 35th St., New York, NY 10001, cloth: $49.95, paper: $19.95.

When times are hard, who gets the pink slip? Economists who believe in the "buffer" theory of labor say that women are the first to go during a recession. "Substitution" theorists say that women are the first to come onboard during leaner days because they are "cheaper" to hire. "Segregationalists" claim none of that matters: there are men's jobs and there are women's jobs. Even with changing technology, workers are divided along gender lines. Editor Jill Rubery asks: Who's right?

All three, say the experts in *Women and Recession.* In fact, they work in tandem: each theory's relative strength depends on a nation's history and culture.

In Italy, for example, there have been jobs that women do and jobs that they don't. While their participation in the labor force is relatively low (23 percent in 1981), they are largely left out of the manufacturing sector. That meant a certain safety from massive unemployment in the 1970s. But now that service jobs are growing, they are more vulnerable to economic downturns. Italian women have become a growing part of that sector.

Traditionally, French women have been used as a labor "reserve," claim French contributing authors

P U B L I C A T I O N S

Patricia Bouillaguet-Bernard and Annie Gauvin. During the lean 1970s, their jobs rapidly became "redundant." But in the 1980s, their flexibility has become a definite asset in the changing workplace.

In 1984, 21 percent of French women, or 1.8 million people, worked part-time. Overall, part-timers increased by 58 percent between 1978 and 1984. "The increasing use of female labour by firms and the continuously increasing importance of women in the productive system can be explained . . . by the ability of female labour to adapt better to the present needs of the firm."

—Blayne Cutler

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